1 Demetrius Atondo (GUARD/PE)

Case No. 04CEPR00218

Attorney: Cheryl L. Browns (for Guardian Gloria Cuevas)

Probate Status Hearing for Failure to File an Inventory and Appraisal and for Failure to File the Annual or Biennial Account.

	GLORIA CUEVAS, maternal	NEEDS/PROBLEMS/COMMENTS:
	grandmother, was appointed	
	guardian of the person and estate	Note: December 1 0 and 2 and delated
	on 8/11/04.	Note: Pages 1, 2 and 3 are related minors (siblings).
Cont. from]	11 III 1013 (310 III 193).
Aff.Sub.Wit.	Letters issued 9/10/04.	Need inventory and appraisal
Verified	Inventory and appraisal was due	and first account or current written status report pursuant to
Inventory	January 2005.	Local Rule 7.5 which states in all
PTC	į	matters set for status hearing
Not.Cred.	First account was due September	verified status reports must be
Notice of	2005.	filed no later than 10 days before
Hrg	 	the hearing. Status Reports must
Aff.Mail	Notice of Status Hearing was mailed to	comply with the applicable code
Aff.Pub.	Cheryl Browns and Gloria Cuevas on	requirements. Notice of the status hearing, together with a copy of
Sp.Ntc.	3/22/16. The mailing for Gloria Cuevas was returned as undeliverable. A	the Status Report shall be served
Pers.Serv.	second Notice of Status Hearing was	on all necessary parties.
Conf.	mailed to Gloria Cuevas on 4/5/16.	
Screen	=	
Letters		
Duties/Supp	 -	
Objections		
Video		
Receipt	=	
CI Report	4	
9202	4	
Order	4	D. 1. 1/T
Aff. Posting		Reviewed by: KT
Status Rpt	_	Reviewed on: 4/22/16
UCCJEA	_	Updates:
Citation	-	Recommendation:
FTB Notice		File 1- Atondo

Attorney: Cheryl L. Browns (for Guardian Gloria Cuevas)

Probate Status Hearing for Failure to File an Inventory and Appraisal and for Failure to File the Annual or Biennial Account.

	GLORIA CUEVAS, maternal	NEEDS/PROBLEMS/COMMENTS:
	grandmother, was appointed	
	guardian of the person and estate	Note: Pages 1, 2 and 3 are related minors (siblings).
	on 8/11/04.	Thirlors (sibilings).
Cont. from	1 attara issues d 0/10/04	2. Need inventory and appraisal
Aff.Sub.Wit.	Letters issued 9/10/04.	and first account or current
Verified	Inventory and appraisal was due	written status report pursuant to
Inventory	January 2005.	Local Rule 7.5 which states in all matters set for status hearing
PTC	,	verified status reports must be
Not.Cred.	First account was due September	filed no later than 10 days before
Notice of	2005.	the hearing. Status Reports must
Hrg		comply with the applicable code
Aff.Mail	Notice of Status Hearing was mailed to	requirements. Notice of the status hearing, together with a copy of
Aff.Pub.	Cheryl Browns and Gloria Cuevas on	the Status Report shall be served
Sp.Ntc.	3/22/16. The mailing for Gloria Cuevas	on all necessary parties.
Pers.Serv.	was returned as undeliverable. A	
Conf.	second Notice of Status Hearing was mailed to Gloria Cuevas on 4/5/16.	
Screen	mailed to Gioria Coevas on 4/3/16.	
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 4/22/16
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 2- Atondo

3 Mia Monai Moreno (GUARD/PE)

Attorney: Cheryl L. Browns (for Guardian Gloria Cuevas)

Case No. 04CEPR00228

Probate Status Hearing for Failure to File an Inventory and Appraisal and for Failure to File the Annual or Biennial Account.

	GLORIA CUEVAS, maternal	NEEDS/PROBLEMS/COMMENTS:
	grandmother, was appointed	Note: Pages 1, 2 and 3 are related minors
	guardian of the person and estate on 8/11/04.	(siblings).
	esiale on 6/11/04.	· 0 /
Cont. from	Letters issued 9/10/04.	3. Need inventory and appraisal and first
Aff.Sub.Wit.	=	account or current written status report pursuant to Local Rule 7.5 which states
Verified	Inventory and appraisal was due	in all matters set for status hearing
Inventory PTC	January 2005.	verified status reports must be filed no
	-	later than 10 days before the hearing.
Not.Cred. Notice of	First account was due September	Status Reports must comply with the
Hrg	2005.	applicable code requirements. Notice of the status hearing, together with a
Aff.Mail	1	copy of the Status Report shall be
Aff.Pub.	Notice of Status Hearing was mailed	served on all necessary parties.
Sp.Ntc.	to Cheryl Browns and Gloria Cuevas on 3/22/16. The mailing for Gloria	
Pers.Serv.	Cuevas was returned as	
Conf. Screen	undeliverable. A second Notice of	
Letters	Status Hearing was mailed to Gloria	
Duties/Supp	Cuevas on 4/5/16.	
Objections		
Video		
Receipt		
CI Report		
9202		
Order	-	Deviewed by VT
Aff. Posting Status Rpt	1	Reviewed by: KT Reviewed on: 4/22/16
UCCJEA	1	Updates:
Citation	1	Recommendation:
FTB Notice	<u> </u>	File 3- Moreno

Amador, Catherine (for Betty Marie Glover – Executor)

Probate Status Hearing Re: Failure to File a Petition for Final Distribution

DOD: 1/18/06	BETTY MARIE GLOVER, daughter, was	NEEDS/PROBLEMS/COMMENTS:
	appointed as Executor with Full IAEA with bond of \$276,000.00 on 8/28/07. Bond was filed and Letters issued on 11/1/07.	Minute Order 1/20/16: Counsel represents that the property is now listed for sale and there has
Cont. from 062014, 081714, 093014, 013015, 073015, 012016 Aff.Sub.Wit.	The appointment was appealed; however, pursuant to the Opinion entered 5/22/08 by the Fifth Appellate District, the order of the probate court was affirmed and costs were awarded to the Executor. Remittur was filed 7/23/08.	been a lot of interest. Note: Attorney Fanucchi filed a "Notice of Lien for Attorney's Fees" alleging fees totaling \$1,630.00; however, there does
Inventory PTC Not.Cred. Notice of	On 2/14/14, the Court set this status hearing for failure to file a petition for final distribution on 2/14/14.	not appear to be any Court order authorizing this sum to this attorney.
Aff.Mail Aff.Pub.	Status Report was filed 4/7/16. See report for details.	Need First Account or Petition for Final Distribution.
Sp.Ntc. Pers.Serv. Conf.	- = = =	
Screen Letters Duties/Supp	 - 	
Objections Objections		
Video Receipt		
CI Report 9202		
Order Aff. Posting		Reviewed by: skc
Status Rpt UCCJEA Citation		Reviewed on: 4/22/16 Updates: Recommendation:
FTB Notice		File 4 – Hunt

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Attorney William F. Docker (for James M. Bell, Successor Trustee)

Eighth Account Current and Report of Trustee and Petition for its Settlement, and for Allowance of Trustee's Fees

חר	DOD: 7/24/2007 JAMES M. BELL, sole surviving Successor Trustee,			NEEDS/PROBLEMS/COMMENTS:
555.7/24/2007			is Petitioner. (Successor Co-Trustee G. Thomas	TILLES, I ROBLEMO, COMMENTO.
			Caswell, Jr. is deceased.)	Note: Probate status
			,	hearings for the filing of
<u> </u>			Account period: 1/01/2015 - 12/31/2015	accountings are not
Co	ont. from			required for this Trust.
	Aff.Sub.Wit.		Accounting - \$923,663.14	
✓	Verified		Beginning POH - \$899,895.91 Ending POH - \$843,024.81	
	Inventory		Ending POH - \$843,024.81	
-	PTC		(\$135,137.08 is cash)	
	Not.Cred.		Trustee - \$6,460.00	
	Notice of		(3/4 of 1% of \$861,942.94 market value of Trust	
\	Hrg		Assets)	
/	Aff.Mail	W/	Investment Fees - \$7,439.56 (paid)	
	Aff.Pub.		(Advisory fees disbursed for 2015)	
	Sp.Ntc.	<u> </u>		
			Accountant - \$710.00 (paid)	
	Pers.Serv.		(disbursed for 2015)	
	Conf. Screen			
			Attorney - \$1,228.00 (paid)	
	Letters		(disbursed for 2015)	
	Duties/Supp		Distributions - \$54,000.00 (paid)	
	Objections		(includes principal funds of \$44,938.17 disbursed	
	Video		to Karol Funch, surviving spouse)	
	Receipt	<u> </u>	<u> </u>	
	CI Report	<u> </u>	Petitioner prays for an Order:	
	9202	<u> </u>	Settling, allowing and approving the Eighth	
✓	Order		Account and Report of the Trustee; 2. Ratifying, confirming and approving all acts	
	Aff. Posting		and transactions of the Trustee relating to	Reviewed by: LEG
	Status Rpt		the matters reflected in the Account and	Reviewed on: 4/22/16
	UCCJEA		Report; and	Updates:
	Citation		3. Authorizing and directing the Trustee to pay	Recommendation:
	himself compensation for services rendered during the period of the Account and		<u>'</u>	File 5 - Funch
			Report in the sum of \$6,460.00 .	
L			II .	

6 Leonardo Castro & Sofia Castro (GUARD/P)

Case No. 09CEPR00412

Petitioner: Isidro Marcos (Pro per – Father of Sofia Castro)

Petition for Visitation (as to SOFIA CASTRO only)

			ISIDRO MARCOS , father of Sofia, is petitioner	NEEDS/PROBLEMS/COMMENTS:
Cont. from			MARIA CASTRO VARGAS, maternal grandmother, was appointed guardian on 10/5/09 – personal	Petition is as to SOFIA CASTRO only. (Petitioner is not Leonardo's father.)
✓	Aff.Sub.Wit.		service 3/27/16. Mother: MARIBEL MARCOS CASTRO –	
	Inventory PTC		personal service 3/27/16.	NOTE: Minute order dated 1/7/16 (for previous petition for visits)
	Not.Cred.		Petitioner states he gets visitation	ordered unsupervised visitation for
1	Notice of Hrg		every Sunday, 12-3 pm as the Court ordered. However, since his visits	Isidro Marcos (father/petitioner) every Sunday from 12:00 pm – 3:00 pm
	Aff.Mail		started they (guardian and minor) have been 15-20 minutes late arriving	starting 1/10/16. Mr. Marcos is to pick the minor up with a proper child
	Aff.Pub.		to where they are supposed to meet	safety seat or the visit will not occur.
	Sp.Ntc.		or they have petitioner drive to where	,
✓	Pers.Serv.	w/	they want him to pick minor up. Minor also would like to spend more time	
	Conf.		with petitioner. He is requesting	
	Screen		overnight visits from Friday afternoon	
	Letters		to Sunday afternoon. The days late	
	Duties/Supp		were: 1/24/16 – 12:24 pm	
	Objections		1/30/16 – 12:30 pm	
	Video		2/14/16 – 12:20 pm	
	Receipt CI Report	<u> </u>		
	9202			
	Order	Х		
	Aff. Posting			Reviewed by: 4/22/2016
	Status Rpt			Reviewed on: SEF
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 6- Castro

6

7 Aaliyah Amber Garcia (GUARD/P)

Petitioner: Brianna Shaw (Pro per - Mother)

Guardian: Norma Jeffrey (Pro per - Maternal great-grandmother

Petition for Visitation

BRIANNA SHAW, mother, is petitioner and NEEDS/PROBLEMS/ requests modification of visitation. COMMENTS: NORMA JEFFREY maternal great-grandmother, Continued from 3/16/16. was appointed quardian of the person on Minute order states parties Cont. from 031616 3/29/2012. are admonished with Aff.Sub.Wit. regard to properly serving Declarations filed 3/10/2016 by Guardian all filed documents. Any Verified additional supplemental Norma Jeffrey. Inventory documentation by Norma Declarations (3) filed 4/5/2016 by Guardian PTC Jeffery is to be filed no later Norma Jeffery. than 4/6/16 with any Not.Cred. response by Brianna Shaw Notice of Declaration filed 4/22/2016 by Mother Brianna due by 4/20/16. The Court Hrg Shaw. warns that missed filing Aff.Mail w/ dates may result in the Court not considering the Aff.Pub. documents. Sp.Ntc. See petition for details. 1. Declarations were filed Pers.Serv. by Norma Jeffrey on Conf. 4/5/16. Need proof of Screen service of declarations Letters on Brianna Shaw Duties/Supp (mother). **Objections** 2. Declaration was filed by Brianna Shaw on Video 4/22/16. Need proof of Receipt service of declaration **CI Report** on Norma Jeffrey 9202 (guardian). Χ Order Aff. Posting Reviewed by: SEF **Status Rpt Reviewed on:** 4/22/16 **UCCJEA Updates:** 4/25/16 Citation **Recommendation:** File 7 - Garcia **FTB Notice**

Case No. 12CEPR00095

Third and Final Account and Report of Conservator; Petition for Allowance of Compensation to Conservator and his Attorney; Termination of Conservatorship and Distribution.

		PUBLIC GUARDIAN, former conservator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
Co	ont. from	MATT BICKEL, professional fiduciary, was appointed as successor Conservator on 1/4/16.	
1	Aff.Sub.Wit.	Account period: 1/18/15 - 2/23/16	
	Inventory PTC	Accounting - \$84,047.94 Beginning POH - \$77,818.22 Ending POH - \$34,610.10	
1	Not.Cred. Notice of	Ending POH - \$34,610.10 Conservator - \$1,256.64	
1	Aff.Mail W/	= 19.34 Deputy hours @ \$94/br and 4.00	
	Aff.Pub. Sp.Ntc.	Attorney - \$1,395.00 (9.3 hours @ 150/hr.)	
	Pers.Serv. Conf. Screen	Bond fee - \$68.80 (o.k.)	
	Letters Duties/Supp	Petitioner prays for an Order: 1. Approving, allowing and settling the	
	Objections Video	third and final account; 2. Authorizing the conservator and attorney fees and commissions; 3. Payment of the bond fee; 4. Distribution of the balance of the	
	Receipt CI Report		
1	9202 Order	property on hand to Bruce Bickel, as successor conservator.	
	Aff. Posting Status Rpt		Reviewed by: KT Reviewed on: 4/25/16
	Citation FTB Notice		Updates: Recommendation: File 8- Lee

Attorney: Mercy L. Hall (for Petitioner/Trustee Herb Thomas)

First Account & Report of Successor Trustee of the Brooke Bertoldi Pooled Special Needs Trust; Petition to Settle Account; to Decrease Bond; and to Fix & Allow Trustee Fees and Attorney Fees & Costs

			HERB THOMAS, Successor Trustee, is	NEEDS/PROBLEMS/COMMENTS:
			petitioner.	
			Account period: 11/18/14 - 11/30/15	Continued from 3/23/16. Minute order states the Court needs clarification as stated in the
	ont. from 021716, 2316	,	Accounting - \$114,708.16 Beginning POH - \$51,005.26	examiner notes with regard to the fees. Counsel is to file a declaration
	Aff.Sub.Wit.		Ending POH - \$43,833.34	at least two court days prior to
✓	Verified		Current Bond is \$129,000.00. Petition	4/27/16. As of 4/22/16 the following issues remain:
	Inventory		requests the bond be reduced to	isses remain.
	PTC		\$49,000.00 (o.k.)	
	Not.Cred.		,	1. Trust agreement allows a
1	Notice of Hrg		Trustee - \$212.50 (1.7 hours @ \$125.00 per hour)	\$1,500.00 annual fee for trust administration. In addition the
✓	Aff.Mail	W/	Trust Administration fees - \$2,056.43	disbursement schedule includes monthly Trust Department fees
	Aff.Pub.		(already paid)	totaling \$412.68 without
	Sp.Ntc.		411	additional explanation and Trust
	Pers.Serv.		Attorney - \$3,702.50 (per itemization and declaration.	Account prep fee of \$143.75. It is unclear what the annual fee
	Conf.		11.70 hrs of paralegal time at \$150/hr	covers if the trust is also paying
	Screen		and 6.7 hrs of attorney time at \$295/hr)	monthly fees for the
	Letters		,	administration of the trust. Court
	Duties/Supp		Costs - \$416.11	may require clarification.
	Objections		(filing fees, FedEx)	
	Video		Petitioner requests the authority to	
	Receipt		receive interim compensation going	
	CI Report		forward based on his current hourly	
	9202		rate, subject to Court confirmation, in	
✓	Order		an amount not to exceed \$1,000.00	
	Aff. Posting		annually.	Reviewed by: KT
	Status Rpt		Please see additional page	Reviewed on: 4/22/16
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 9A- Bertoldi
-				9Δ

9A In Re: Brooke Bertoldi (SNT)

Case No. 13CEPR00625

Petitioner prays for an Order:

- 1. Approving, allowing and settling the First Account and Report of Successor Trustee;
- 2. Make and order decreasing the bond to \$49,000.00;
- 3. Authorizing and directing payment to Herb Thomas trustees fees totaling \$212.50;
- 4. Authorizing Trustee to receive interim compensation going forward based on his hourly rate, and subject to Court confirmation, in an amount not to exceed \$1,000.00 annually;
- 5. Authorizing attorney fees of \$3,702.50 and costs of \$416.11.

Note: If the petition is granted, status hearings will be set as follows:

- Wednesday, May 25, 2016 at 9:00 a.m. in Department 303, for the filing of the reduced bond.
- **Wednesday, February 28, 2018** at 9:00 a.m. in Department 303, for the filing of the second account of successor trustee.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.

9B In Re: Brooke Bertoldi (SNT)

Attorney: Mercy L. Hall (for former Trustee Fremont Bank)

Probate Status Hearing re: Proof of Notice to DMV

Cont. from 080315, 083115, 113015, 031416, 032316 Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Obiections	FREMONT BANK, former Trustee, petitioned the court for approval of their first and final account. HERB THOMAS is the current successor trustee. The first and final account showed that Fremont Bank as Trustee for the Trust purchased a handicap equipped van for the beneficiary and distributed the van directly to the beneficiary. Minute Order dated 6/29/15 states the court orders that the DMV is to be noticed that the Trust shall be the lienholder for the vehicle. Counsel is to submit a declaration verified by Herb Thomas. Former Status Report filed on 11/25/15 states Charities Pooled Trust (CPT) has been attempting to secure a lien on the vehicle, however it may not do so until the DMV issues and Electronic Lien Title	Continued from 3/23 order states Counsel the Trustee is waiting process the lien paper is to bring paper proof the 4/27/16 hearing. 1. Need proof that the lienholder on the current written states in all matter hearing verified somust be filed not applicable code. Notice of the state together with a concessary parties.
- 	vehicle, however it may not do so until	
9202 Order Aff. Posting Status Rpt UCCJEA Citation	lienholder on the vehicle.	Reviewed by: KT Reviewed on: 4/22/1 Updates: Recommendation:
FTB Notice		File 9B – Bertoldi

OMMENTS:

3/16. Minute el represents that g for the DMV to perwork. Counsel oof of the lien for

the Trust is a e vehicle or tatus report al Rule 7.5 which ers set for status status reports later than 10 hearing. Status mply with the e requirements. atus hearing, copy of the Status erved on all s.

16

9B

Barbara Ann Sena (Estate) Case No. 140
Waite, Liana M. (Attorney Administrator with Will Annexed)
Status RE: Filing of the First Account and/or Petition for Final Distribution

DOD: 9/26/13		LIANA M. WAITE, Daughter, was appointed	NEEDS/PROBLEMS/COMMENTS:
		Administrator with Will Annexed with Full	
		IAEA without bond on 7/15/14. Letters	Minute Order 3/16/16; Ms. Waite
		issued 7/17/14.	represents that there are tax
Co	ont. from 091615,	At the hearing on 7/15/14, the Court set	liabilities to resolve, and requests additional time.
	1616	this status hearing re filing the first account	additional time.
	Aff.Sub.Wit.	or petition for final distribution.	Need first account or petition
	Verified		for final distribution.
	Inventory	Status Report filed 4/20/16 incorporates	
	PTC	the information set forth in the status	
	Not.Cred.	report of 3/8/16 and further states: Attoreny Barbara A. Sena had several	
	Notice of	Workers' Compensation client cases	
	Hrg	which were pending at the time of her	
	Aff.Mail	death. The Administrator notified the	
	Aff.Pub.	active clients of her passing and the cases	
	Sp.Ntc.	have been transferred to the respective	
	Pers.Serv.	legal representatives accordingly. The Administrator has not acted as the legal	
	Conf.	representative for any of the decedent's	
	Screen	clients.	
	Letters		
	Duties/Supp	The Administrator has recently been	
	Objections	advised that some of the workers' compensation client cases are nearing	
	Video	settlement, and therefore will pursue	
	Receipt	attorney liens on behalf of the estate once	
	CI Report	these cases have settled. These client	
	9202	cases, along with the federal and state	
	Order	tax liens and/or liabilities,	
	Aff. Posting	must be resolved prior to preparation of a petition for final distribution.	Reviewed by: skc
	Status Rpt		Reviewed on: 4/22/16
<u> </u>	UCCJEA	4	Updates:
<u> </u>	Citation	4	Recommendation:
	FTB Notice		File 10 - Sena

Kenneth A. Baldwin (for Leonard C. Bacome, Executor)

First and Final Report of Executor of Will and Petition for its Settlement, for Allowance of Executor's Statutory Commissions, Allowance of Attorneys' Statutory and Extraordinary Fees, and for Final Distribution of Estate Under Decedent's Will on Waiver of Account

DOD: 4/13/2014			LEONARD C. BACOME, son and		NEEDS/PROBLEMS/COMMENTS:
			Executor, is Petitioner.		
					1. Local Rule 7.17(B) specifies
			Accounting is waived.		certain expenses which are
Со	nt. from			,672.37	considered by the Court to be part of doing business, and are
	Aff.Sub.Wit.		·	,072.37 ,148.25	therefore not reimbursable costs
	Verified		(all c		or fees. Local Rule 7.17 does not
~			,	,	differentiate between ordinary
✓	Inventory		Executor — \$6,55	50.00	costs vs. extraordinary costs.
✓	PTC		(statutory)		Paragraph 17 of the Petition contains an itemization of
✓	Not.Cred.		Attorney — \$6,55	50.00	"extraordinary" costs which includes the following non-
1	Notice of		(statutory)		reimbursable fees pursuant to
	Hrg		Attorney X/O — \$9,59	96.50	Local Rule 7.17(B)(7), for Court
✓	Aff.Mail	W/	(Itemized at Exhibits I and II; for i		Runner services totaling \$313.10 .
	Aff.Pub.		hours for services pertaining to converting Notes and Deeds of	Truct to	Court may require the proposed order to be interlineated to
	Sp.Ntc.		real property ownership interest;		deduct the following costs from
	Pers.Serv.		hours for settlement attempts, e		the amount of allowable costs,
1	Dec.		proceedings of tenants in estate		and to increase the cash
	Trustee		property to enable sale and dist	ribution	distribution:
	Letters 0513	315	of assets; @ \$170/hour, \$250/hour and		Process server fee: \$91.25;
	Duties/Supp \$350/hour attorney rates; \$125/hour		Deliver documents: \$71.50; Elling foot and research foot: The property of the property		
	Objections		and \$160/hour paralegal rates;)		 Filing fees and research fees: \$150.35.
	Video		Costs — [\$1,9	46.60 <u>or</u>	\$130.03.
	Receipt		_ · ·	33.50]	
	CI Report		(filing fees including unlawful de		
✓	9202		publication, certified copies; inc "extraordinary" costs for runner	ludes	
✓	Order		services;)		
	Aff. Posting		Biskile alian mana and la Barria	-17 - \A 011	Reviewed by: LEG
	Status Rpt		Distribution pursuant to Deceder	nt's Will	Reviewed on: 4/25/16
	UCCJEA		is to:		Updates:
	Citation		LEONARD C. BACOME, as Trustee	e of the	Recommendation:
✓	FTB Notice		HAZEL M. BACOME LIVING TRUST		File 11- Bacome
			[\$124,505.15 <u>or</u> \$124,818.25] cas		

12 Alisha Clark (GUARD/P)

Case No. 15CEPR00415

Attornev Attorney

Hunt, Gary A. (for Penny Sabanovich – maternal grandmother/Petitioner) Boyajian, Thomas M. (for Carl Clark, Carl – Father) (Substitution filed 3/30/16)

Petitioner Penny Sabanovich's Notice of Motion and Motion to Enforce July 24, 2015 Order and Clarification of Visitation Stipulation and Order

		Crandon there and former	NEED3/FROBLEMS/
		Grandmother, and former temporary guardian, is Movant. See pleadings for details.	Minute Order 3/9/ continued for writt filed. Said objection
	om 030916	see pleadings for details.	served by 3/30/16 by 4/13/16. The Co
	Sub.Wit.	4	Mr. Clark paying th
✓ Veri		4	The following issue
	entory	4	The following issue
PTC		-	1. Probate Code
	Cred.	=	parent has cus modification o
Hrg	ice oi		upon terminati
✓ Aff./	Mail w	-	shall be detern
Aff.		=	under the Fam
Sp.N		1	case exists in a order may be u
	s.Serv.		opening a cas
Con			the custodial p
Scre			Carl Clark, the
Lette	ers		the minor resid
Duti	es/Supp		Monterey Cou
Obj	ections		Need clarificat
Vide		1	family law case
	eipt		any other jurisc
	eport		authority re juri orders re enfor
9202		4	of this order in
✓ Ord	er		Court Probate
			may be require
			to an existing F open a new co
			as applicable.
			Note: Petitione
			Probate Code section pertain
			settling accou
			guardianship c
			not apply in thi
	Posting		Reviewed by: skc
	us Rpt		Reviewed on: 4/22
	CJEA	4	Updates:
	ition	4	Recommendation
FTB	Notice		File 12- Clark

PENNY SABANOVICH. Maternal

NEEDS/PROBLEMS/COMMENTS:

16: This matter is ten objections to be ons are to be filed and s and any replies are due ourt reserves the issue of the attorney's fees.

e remains noted:

§1602 states while a stody, proceedings for of visitation orders made ion of a auardianship mined in a proceeding nily Code. If no custody any county, the visitation used as the basis for se in the county in which oarent resides.

custodial parent, and de in Salinas, which is unty.

tion re whether any e is currently existing in diction, and further risdiction to make further rcement or clarification the Fresno Superior Court. Ms. Sabanovich ed to either seek joinder Family Law case, or ase in Monterey County,

er continues to cite § §2630; however, this ns to iurisdiction re nts on termination of the <u>estate</u> and does nis situation.

Reviewed by: skc	
Reviewed on: 4/22/16	
Updates:	
Recommendation:	
File 12- Clark	

Petitioner: Carol Jean Steinhauer (Pro per – Non-relative)

Petition for Appointment of Guardian of the Person

			TEMPORARY EXPIRES 4/27/16	NEEDS/PROBLEMS/COMMENTS:
			ILIVITORARI EXFIRES 4/21/10	NLLD3/FROBLEMS/COMMENTS.
Со	nt. from		CAROL STEINHAUER, non-relative, is petitioner. DSS Social Worker report filed	Minute order dated 3/7/16 (temporary hearing) states mom must be personally served for general hearing. Court orders there shall be no visits for either parent until they appear before the Court.
	Aff.Sub.Wit.		4/21/16.	offill filey appear before the cooff.
✓	Verified			Petitioner requests to be excused from notice to father and mother of minor. If
	Inventory			court does not excuse notice need
	PTC		See petition for details.	proof of personal service 15 days prior
	Not.Cred.			to hearing of Notice of Hearing with
	Notice of Hrg	Х		copy of petition <u>or</u> consents and waivers of notice for:
	Aff.Mail	Χ		a. Father
	Aff.Pub.			b. Jamie Matney (mother)
	Sp.Ntc.			2. UCCJEA form does not list minor's
	Pers.Serv.	Х		residence information for the period of
1	Conf.			March 2011 through February 2015.
	Screen			
✓	Letters			
1	Duties/Supp			
	Objections			
	Video			
	Receipt			
✓	DSS Report			
	9202			
✓	Order			
	Aff. Posting			Reviewed by: SEF
	Status Rpt			Reviewed on: 4/22/2016
1	UCCJEA			Updates: 4/25/2016
	Citation			Recommendation:
	FTB Notice			File 13- Matney

Bagdasarian, Gary G. (for Administrator Kennith E. Horn)

Probate Status Hearing Re: Proof of Funds deposited into blocked account

1 TODGIE 31	Flobale Status Healing Re. Floor of Fortas deposited titlo blocked decount		
DOD: 6/18/15		NEEDS/PROBLEMS/COMMENTS:	
		OFF CALENDAR	
Cont. from 033016		Receipt for blocked account was filed 4/4/16	
Aff.Sub.Wit.		med 4/4/10	
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of			
Hrg Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf.			
Screen			
Letters			
Duties/Supp			
Objections			
Video			
Receipt			
CI Report			
9202			
Order		Pariamed hypotes	
Aff. Posting		Reviewed by: skc	
Status Rpt UCCJEA		Reviewed on: 4/21/16 Updates:	
Citation		Recommendation:	
FTB Notice		File 14- Clark	

15 Leann Moreno and Leo Moreno IV (GUARD/P) Case No. 16CEPR00041 Petitioner: Efrain Palma (Pro per – Maternal step-grandfather)

Petition for Appointment of Guardian of the Person (as to LEANN MORENO only)

		NO TEMPORARY REQUESTED	NEEDS/PROBLEMS/COMMENTS:
		EFRAIN PALMA, maternal step-	Petition is as to <u>LEANN MORENO</u>
		grandfather, is petitioner	only.
Со	nt. from 031616	Court Investigator report filed 3/9/2015.	NOTE: Petitioner filed a separate
	Aff.Sub.Wit.		petition for guardianship of
✓	Verified		Leo Moreno IV that is set for 5/31/16.
	Inventory	See petition for details.	6,61,16.
	PTC		
	Not.Cred.		Continued from 3/16/16.
✓	Notice of Hrg		Minute order states any written objections to be filed by 4/6/2016.
✓	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
✓	Conf.		
H	Screen Letters		
✓			
✓	Duties/Supp		
	Objections		
	Video		
_	Receipt	-	
✓	CI Report		
	9202	_	
✓	Order		
	Aff. Posting		Reviewed by: SEF
	Status Rpt		Reviewed on: 4/22/2016
✓	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 15- Moreno

Case No. 16CEPR00053

16 Mariah Hernandez (GUARD/P)
Petitioner: Mariah Jovita Hernandez – Minor/Proposed Ward (Pro Per)

Petition for Appointment of Guardian of the Person

MARIAH HERNANDEZ, minor/proposed ward, is petitioner and requests EILEEN GARCIA, maternal grandmother, be appointed guardian. Aff.Sub.Wit.				TEMPORARY EXPIRES 4/27/2016	NEEDS/PROBLEMS/COMMENTS
Verified	Co	T T		is petitioner and requests EILEEN GARCIA , maternal grandmother, be appointed guardian.	Minute order states mother waives notice in open court. The Court directs Ruben
Inventory	✓			proposed guardian - consents to	clerk's office forthwith and
Not.Cred. √ Notice of Hrg ✓ Aff.Mail w/ Aff.Pub. Sp.Ntc. Pers.Serv. x ✓ Conf. Screen ✓ Letters ✓ Duties/Supp Objections Video Receipt ✓ Crag. Aff. Posting Status Rpt ✓ UCCJEA Citation See petition for details. See petition for details. See petition for details. investigator. Father represents that the minor has Native American ancestry. Any written objections are to be filed and properly served by 4/12/16. The Court grants temporary orders without prejudice to preserve the status quo; Letters are to issue forthwith. Reviewed by: SEF Reviewed on: 4/22/2016 Updates: Recommendation:		,			·
Nof.Cred. ✓ Notice of Hrg ✓ Aff.Mail ✓ Aff.Mail ✓ Aff.Pub. Sp.Ntc. Pers.Serv. × ✓ Conf. Screen ✓ Letters ✓ Duties/Supp Objections Video Receipt ✓ CI Report 9202 ✓ Order Aff. Posting Status Rpt ✓ UCCJEA Citation that the minor has Native American ancestry. Any written objections are to be filled and properly served by 4/12/16. The Court grants temporary orders without prejudice to preserve the status quo; Letters are to issue forthwith. Reviewed by: SEF Reviewed on: 4/22/2016 Updates: Recommendation:				Court investigator report filed 3/3/2016.	
✓ Aff.Mail W/ Aff.Pub. Sp.Ntc. Pers.Serv. x ✓ Conf. Screen ✓ Letters ✓ Duties/Supp Objections Video Receipt ✓ CI Report ✓ 9202 ✓ Order Aff. Posting Status Rpt ✓ UCCJEA Recommendation: **Witten objections are to be filed and properly served by 4/12/16. The Court grants temporary orders without prejudice to preserve the status quo; Letters are to issue forthwith. **Reviewed by: SEF **Reviewed by: SEF **Reviewed on: 4/22/2016 Reviewed on: 4/22/2016 Updates: Recommendation:					that the minor has Native
Aff.Pub. Sp.Ntc. Pers.Serv. x Conf. Screen Ditters Ditters Video Receipt CI Report 9202 Order Aff. Posting Status Rpt UCCJEA Citation Sp.Ntc. filed and properly served by 4/12/16. The Court grants temporary orders without prejudice to preserve the status quo; Letters are to issue forthwith. Filed and properly served by 4/12/16. The Court grants temporary orders without prejudice to preserve the status quo; Letters are to issue forthwith. Filed and properly served by 4/12/16. The Court grants temporary orders without prejudice to preserve the status quo; Letters are to issue forthwith. Video Receipt VIGEO Reviewed by: SEF Reviewed on: 4/22/2016 Updates: Recommendation:	√				· · · ·
Aff.Pub. Sp.Ntc. Pers.Serv. x √ Conf. Screen ✓ Letters ✓ Duties/Supp Objections Video Receipt ✓ CI Report 9202 ✓ Order Aff. Posting Status Rpt ✓ UCCJEA Citation 4/12/16. The Court grants temporary orders without prejudice to preserve the status quo; Letters are to issue forthwith. Fers.Serv. x 4/12/16. The Court grants temporary orders without prejudice to preserve the status quo; Letters are to issue forthwith. ✓ Conf. Screen Status Quo; Letters are to issue forthwith. Fers.Serv. x ✓ Duties/Supp Reviewed by: SEF Reviewed by: SEF Reviewed on: 4/22/2016 Updates: Recommendation:	✓	Aff.Mail	w/	See petition for details.	3
Pers.Serv. x √ Conf. Screen ✓ Letters ✓ Duties/Supp Objections Video Receipt ✓ CI Report 9202 ✓ Order Aff. Posting Status Rpt ✓ UCCJEA Citation Prejudice to preserve the status quo; Letters are to issue forthwith. Reviewed by: SEF Reviewed on: 4/22/2016 Updates: Recommendation:		Aff.Pub.		,	4/12/16. The Court grants
Tels.selv.		Sp.Ntc.			
✓ Conf. Screen ✓ Letters ✓ Duties/Supp Objections Video Receipt ✓ CI Report 9202 ✓ Order Aff. Posting Status Rpt ✓ UCCJEA Citation forthwith. Reviewed by: SEF Reviewed by: SEF Reviewed on: 4/22/2016 Updates: Recommendation:		Pers.Serv.	Χ		
✓ Duties/Supp Objections Video Receipt ✓ CI Report 9202 ✓ Order Aff. Posting Status Rpt ✓ UCCJEA Updates: Citation Reviewed by: SEF Reviewed on: 4/22/2016 Updates: Recommendation:	✓	Conf. Screen			·
Objections Video Receipt ✓ CI Report 9202 ✓ Order Aff. Posting Status Rpt ✓ UCCJEA Citation Reviewed by: SEF Reviewed on: 4/22/2016 Updates: Recommendation:	✓	Letters			
Video Receipt ✓ CI Report 9202 ✓ Order Aff. Posting Status Rpt ✓ UCCJEA Citation Reviewed by: SEF Reviewed on: 4/22/2016 Updates: Recommendation:	✓	Duties/Supp			
Receipt ✓ CI Report 9202 ✓ Order Aff. Posting Status Rpt ✓ UCCJEA Citation Receipt ✓ UCCJEA Reviewed by: SEF Reviewed on: 4/22/2016 Updates: Recommendation:					
9202 ✓ Order Aff. Posting Status Rpt ✓ UCCJEA Citation Reviewed by: SEF Reviewed on: 4/22/2016 Updates: Recommendation:					
✓ Order Aff. Posting Status Rpt ✓ UCCJEA Citation Reviewed by: SEF Reviewed on: 4/22/2016 Updates: Recommendation:	✓	CI Report			
Aff. Posting Status Rpt ✓ UCCJEA Citation Reviewed by: SEF Reviewed on: 4/22/2016 Updates: Recommendation:		9202			
Status Rpt ✓ UCCJEA Citation Reviewed on: 4/22/2016 Updates: Recommendation:	✓	Order			
✓ UCCJEA Updates: Citation Recommendation:					Reviewed by: SEF
Citation Recommendation:		Status Rpt			Reviewed on: 4/22/2016
	✓	UCCJEA			Updates:
File 16- Hernandez					
		FTB Notice			File 16- Hernandez

16

Shepard, Jefferson S. (for Petitioner Dennis V. Yates)

Corrected Petition for Probate of Will and for Letters of Administration with Will Annexed and Authorization to Administer under the IAEA

DOD: 11/12/15	DENNIS V. YATES is Petitioner and	NEEDS/PROBLEMS/COMMENTS:
Cont. from	requests appointment as Administrator with Will Annexed with bond of \$950,000.00. (Bond filed 4/18/16.)	Note: Petitioner Dennis V. Yates is the Successor Trustee of the Matlock Living Trust, which is the beneficiary of this estate.
S/P Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc.	Petitioner is a resident of Plantersville, TX. Full IAEA – ok Will dated 5/16/03 1st Codicil dated 9/26/03 Residence: Sanger, CA Publication: Business Journal Estimated value of estate:	Need declination to act from named alternate executor Connie Rae Hall. Note: If granted, the Court will set status hearings as follows: Wednesday, September 28, 2016 for filing Inventory and Appraisal Wednesday, July 26, 2017 for filing the first or final account.
Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt	Personal property: \$900,000.00 Annual income: \$9,000.00 Real property: \$35,000.00 Total: \$944,000.00 Probate Referee: Rick Smith	
CI Report 9202 Order		
Aff. Posting Status Rpt UCCJEA		Reviewed by: skc Reviewed on: 4/25/16 Updates:
Citation FTB Notice		Recommendation: SUBMITTED File 17- Matlock

18 Emit Apple (Spousal)

Case No. 16CEPR00201

Attorney Matsumoto, Russell D. (for Cleo Apple – Petitioner – Spouse)

Spousal or Domestic Partner Property Petition

No other proceedings. Will dated 06/12/2000 devises the real property to the Vern and Cleo Apple 2000 Revocable Trust. Petition requests Court confirmation that the real property located in Fresno County pass to the petitioner. Petition of Petitioner Cleo Apple in Support of Spousal Property Petition and Real Property Contact in Title filed 04/08/2016 states on June 12, 2000, decedent and petitioner observed the property commonly known as 576 E. Pets.Serv. Pets.Serv. Pets.Serv. Publics/Supp Collections Video Receipt Petitions Petitions Petitions Petition Pet	DOI	D: 10/11/2014	CLEO APPLE, surviving spouse, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 033016 Aff.Sub.Wift. ✓ Verified Petition requests Court confirmation that the real property located in Fresno County pass to the petitioner. Not.Cred. Not.Cred. ✓ Notice of Hrg Aff.Mail W/ Aff.Mail W/ Aff.Pub. Sp.Nic. Pers.Serv. Letters Conf. Screen Duttes/Supp Objections Video Notice of Objections Video Notice of Duttes/Supp Lotters Aff. Posting First Notice of Duttes/Supp FTB Notice Notice of Duttes/Supp Objections Status Rpt In 2008, in order to provide financial and Petitioner, for no monetary consideration had quitclaim Deed and Petitioner, for no monetary consideration had quitclaim Deed and Petitioner, for no monetary consideration had quitclaim Deed and Petitioner, for no monetary consideration had quitclaim Deed and Petitioner, for no monetary consideration had quitclaim Deed dated May 8, 2008, and recorded on May 13, 2008, and recorded on May 14, 2008, and recorded on May 1			No other proceedings.	
Verified Inventory Petition requests Court confirmation that the real property located in Fresno County pass to the petitioner. Cleo Apple in Support of Spousal Property Petition and Real Property Chain of Tifle filed 04/08/2016 states on June 12, 2000, decedent and petitioner stablished the Vern and Cleo Apple 2000 Revocable Trust, as a revocable grantor trust. Prior to establishing the Trust, decedent and petitioner owned the property commonly known as 576 E. Screen Polk St. Coalinga, and more particularly described at on affachments 7a and 7b of the petition. Pursuant to Quitclaim Deed dated June 12, 2000, and recorded on June 19, 2000, as Document No. 2000-0073072, in Official Records of Fresno County, attached and petitioner, for no monetary consideration had quitclaim Deed dated June 12, 2000, and recorded on June 19, 2000, as Document No. 2000-0073072, in Official Records of Fresno County, attached and petitioner, for no monetary consideration had quitclaim Deed dated May 8, 2008, and recorded on the Property to the Trust. Reviewed by: LV Reviewed on: 04/25/2016 Updates: Recommendation: File 18- Apple treatment on the Property to Emie, by Quitclaim Deed dated May 8, 2008, and recorded on May 13, 2008, as Document No. 2008-009768, in Official Records of Fresno County, attached hereto as Exhibit B is a copy of the Quitclaim Deed dated May 8, 2008, and recorded on May 13, 2008, as Document No. 2008-009768, in Official Records of Fresno County, attached hereto as Exhibit B is a copy of the Quitclaim Deed, and a two thirds (2/3°) interest was retained by the Trust.	Cor		property to the Vern and Cleo Apple 2000	with regard to the issues raised in the
Sp.Ntc. Pers.Serv. Conf. Screen Duffies/Supp Objections Video Receipt Cl (Report Status Rpt UCCJEA Citation FTB Notice Sp.Ntc. Apple 2000 Revocable Trust, as a revocable grantor trust. Prior to establishing the Trust, decedent and petitioner owned the property commonly known as 576 E. Polk St. Coalinga, and more particularly described at on attachments 7a and 7b of the petition. Pursuant to Quitclaim Deed dated June 12, 2000, and recorded on June 19, 2000, as Document No. 2000-0073072, in Official Records of Fresno County, attached herefo as Exhibit A is a copy of the Quitclaim Deed. Decedent and Petitioner, for no monetary consideration had quitclaimed their interest in the Property to the Trust. Reviewed by: LV Reviewed on: 04/25/2016 Updates: Recommendation: FIB Notice Receipt Citation FIB Notice Aff. Posting Status Rpt UCCJEA Citation	H	Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail	Petition requests Court confirmation that the real property located in Fresno County pass to the petitioner. Declaration of Petitioner Cleo Apple in Support of Spousal Property Petition and Real Property Chain of Title filed 04/08/2016 states on June 12, 2000, decedent and	 question to the Vern and Cleo Apple 2000 Revocable Trust not the surviving spouse/petitioner therefore this procedure cannot be used. 2. Declaration filed 04/08/2016 states Quitclaim deed dated June 12, 2000, attached as Exhibit A; Quitclaim
dated June 12, 2000, and recorded on June 19, 2000, as Document No. 2000-0073072, in Official Records of Fresno County, attached hereto as Exhibit A is a copy of the Quitclaim Deed. Decedent and Petitioner, for no monetary consideration had quitclaimed their interest in the Property to the Trust. Native Rpt		Sp.Ntc. Pers.Serv. Conf. Screen	Apple 2000 Revocable Trust, as a revocable grantor trust. Prior to establishing the Trust, decedent and petitioner owned the property commonly known as 576 E. Polk St. Coalinga, and more particularly	as Exhibit B; and Quitclaim deed dated November 5, attached as Exhibit C; are attached however neither of the Quitclaim deeds were attached as exhibits to the
 ✓ Order Aff. Posting Status Rpt UCCJEA Citation FTB Notice In 2008, in order to provide financial accommodations for their grandson, Ernest Kallilimoku Apple, also known as Ernie Apple (herein Ernie), decedent and petitioner, transferred one third (1/3rd) interest in the Property to Ernie, by Quitclaim Deed dated May 8, 2008, and recorded on May 13, 2008, as Document No. 2008-0069768, in Official Records of Fresno County, attached hereto as Exhibit B is a copy of the Quitclaim Deed, and a two thirds (2/3rd) interest was retained by the Trust. 		Objections Video Receipt CI Report	dated June 12, 2000, and recorded on June 19, 2000, as Document No. 2000- 0073072, in Official Records of Fresno County, attached hereto as Exhibit A is a copy of the Quitclaim Deed. Decedent	
Status Rpt UCCJEA UCCJEA UCCJEA UCCJEA UCCJEA UCCJEA UCCJEA UDdates: Citation FTB Notice In 2008, in order to provide financial accommodations for their grandson, Ernest Kalilimoku Apple, also known as Ernie Apple (herein Ernie), decedent and petitioner, transferred one third (1/3rd) interest in the Property to Ernie, by Quitclaim Deed dated May 8, 2008, and recorded on May 13, 2008, as Document No. 2008-0069768, in Official Records of Fresno County, attached hereto as Exhibit B is a copy of the Quitclaim Deed, and a two thirds (2/3rd) interest was retained by the Trust.	1	Order	consideration had quitclaimed their interest	Poviowed by: 11/
Citation Kalilimoku Apple, also known as Ernie Apple (herein Ernie), decedent and petitioner, transferred one third (1/3rd) interest in the Property to Ernie, by Quitclaim Deed dated May 8, 2008, and recorded on May 13, 2008, as Document No. 2008-0069768, in Official Records of Fresno County, attached hereto as Exhibit B is a copy of the Quitclaim Deed, and a two thirds (2/3rd) interest was retained by the Trust. Recommendation: File 18- Apple	H	Status Rpt	·	Reviewed on: 04/25/2016
(herein Ernie), decedent and petitioner, transferred one third (1/3 rd) interest in the Property to Ernie, by Quitclaim Deed dated May 8, 2008, and recorded on May 13, 2008, as Document No. 2008-0069768, in Official Records of Fresno County, attached hereto as Exhibit B is a copy of the Quitclaim Deed, and a two thirds (2/3 rd) interest was retained by the Trust.	H			•
			(herein Ernie), decedent and petitioner, transferred one third (1/3 rd) interest in the Property to Ernie, by Quitclaim Deed dated May 8, 2008, and recorded on May 13, 2008, as Document No. 2008-0069768, in Official Records of Fresno County, attached hereto as Exhibit B is a copy of the Quitclaim Deed, and a two thirds (2/3 rd) interest was retained by the Trust.	

18(additional page) Emit Apple (Spousal)

Case No. 16CEPR00201

Ernie indicated a tenant in common as to a one third (1/3rd) interest. The effect of the tenancy in common was to give Ernie an estate of inheritance to support a financing condition in the startup of a new business.

Seven months later, in December 2008, the lender Ernie was obtaining financing from established an escrow with Fidelity National Title Company, and insisted upon removing any reference to the Trust. On November 5, 2008, Ernie, decedent and petitioner as Trustees, executed a Grant Deed, recorded December 12, 2008, as Document No. 2008-0169921, in Official Records of Fresno County, attached hereto as Exhibit C is a copy of the Grant Deed under which decedent and petitioner, husband and wife, as community property, became vested with a two thirds (2/3rd) interest in the Property as tenants in common. The remaining one third (1/3rd) interest was retained by Ernie as to a one third (1/3rd) interest as tenant in common.

At the time Fidelity National Title required the two thirds $(2/3^{rd})$ interest in the property be removed from the trust, petitioner was present when decedent stated their mutual reluctance to do so, because they had been told by the attorney who assisted in preparation of the Trust that unless real property was in the Trust it would be subject to Probate. Decedent and Petitioner were told by the lender's representative and the title company's representative that it would not make a difference and the property would be transferred to the survivor automatically because they would define the property as community property and community property was not subject to probate. Since Decedent and Petitioner had explained to them, by persons they believed to be knowledgeable of such matters, they believed that the property would not be subject to the Will or the Trust and executed the deed prepared for them.

The petition seeks a determination that the Decedent's interest in the property passed to petitioner as spousal property, characterized as community property of Decedent and petitioner at the time of Decedent's death, and not subject to the "pour over" provisions of Decedent's Will, as petitioner had believed would be the outcome.

19 Aubrie Church (GUARD/P)

Case No. 16CEPR00204

Petitioner: Anissa Kay Lotspeich (Pro per – 2nd Cousin) Petitioner: Lori Lotspeich Ingram (Pro per – 2nd Cousin)

Objector: Adam Anaya (Pro per - Father)

Petition for Appointment of Guardian of the Person (Initial)

	Petition for Appointment of Guardian of the Person (Initial)			
			TEMPORARY EXPIRES 4/27/16	NEEDS/PROBLEMS/COMMENTS:
✓ '	t. from Aff.Sub.Wit. Verified Inventory		LORI LOTSPEICH INGRAM and ANISSA LOTSPEICH, second cousins, are petitioners. Objections of Father Adam Anaya filed 3/4/16. Objections of Father Adam Anaya filed 3/19/16.	Minute order dated 3/8/16 states Adam Anaya (father) is to properly serve his filed objections or the Court will strike them and not consider them. Court orders no visitation for Marci Henson (mother) until she appears
	PTC Not.Cred. Notice of		Court Investigator report filed 4/27/16.	before the Court. The Court orders supervised visitation as mutually agreed by all parties for Adam Anaya.
	Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report	w/ w/	See petition for details.	Petitioners: 1. Petitioners request to be excused from giving notice to Mike Church (maternal grandfather). If court does not excuse notice, need proof of mailed service 15 days before the hearing of the Notice of Hearing with a copy of the petition or consent and waiver of notice on Mike Church. Objector: 1. Objections were served on petitioners and mother. However, it is unclear which objection(s) were served as
√ !	Aff. Posting Status Rpt UCCJEA Citation FTB Notice			father filed objections on both 3/4/16 or 3/18/16. Reviewed by: SEF Reviewed on: 4/25/16 Updates: Recommendation: File 19- Church

Knudson, David N. (for Petitioner Marlon D. Serimian)

Petition to Appoint Successor Trustee

	MARLON D. SERIMIAN, Beneficiary, is Petitioner.	NEEDS/PROBLEMS/ COMMENTS:
	See petition for details.	
	·	
Aff.Sub.Wit.		
✓ Verified		
Inventory		
PTC		
Not.Cred.		
✓ Notice of		
Hrg		
✓ Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
✓ Order		
Aff. Posting		Reviewed by: skc
Status Rpt		Reviewed on: 4/25/16
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 20- Serimian

20

Knudson, David N. (for Petitioner David M. Serimian)

Petition to Appoint Successor Trustee

	DAVID M. SERIMIAN , Beneficiary, is Petitioner.	NEEDS/PROBLEMS/ COMMENTS:
	See petition for details.	GOMMENTO.
	·	
Aff.Sub.Wit.		
✓ Verified		
Inventory		
PTC		
Not.Cred.		
✓ Notice of		
Hrg Aff Mail		
All.Mall		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters Common		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
✓ Order		
Aff. Posting		Reviewed by: skc
Status Rpt		Reviewed by: ske
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 21- Serimian

Lopez, Amy L. (for Makitus Secoy – Step-Mother – Petitioner)

Petition for Appointment of Temporary Guardian of the Person

			See petition for details.	NEEDS/PROBLEMS/COMMENTS:
				Continued from 3/22/16. All notice issues for the temporary hearing have now been cured (mother
Со	nt. from 03221 <i>6</i>	5		served 3/30/16).
	Aff.Sub.Wit.			,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,
>	Verified			
	Inventory			
	PTC			
	Not.Cred.			
~	Notice of Hrg			
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
>	Pers.Serv.	W		
~	Conf.			
	Screen			
~	Letters			
~	Duties/Supp			
	Objections			
	Video			
	Receipt			
	CI Report			
	9202			
<u> </u>	Order			<u> </u>
	Aff. Posting			Reviewed by: skc
,,	Status Rpt			Reviewed on: 4/21/16
~	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 22- Secoy

Wall, Jeffrey L. (for Petitioner Lorrie Emerson)

Petition for Letters of Administration; Authorization to Administer Under the IAEA

DO	D: 6/9/11	LORRIE EMERSON, daughter, is Petitioner	NEEDS/PROBLEMS/COMMENTS:
		and requests appointment as	
		Administrator with Full IAEA without bond.	Note: The Court will set status hearings as follows:
		Boria.	
Со	nt. from	All heirs waive bond.	Wednesday, September 28, 2016 for filing Inventory and Appraisal
	Aff.Sub.Wit.		,
~	Verified	Full IAEA – ok	Wednesday, July 26, 2017 for filing the first or final account.
-	Inventory	Decedent died intestate	
	PTC		
	Not.Cred.	Residence: Fresno	
~	Notice of	Publication: Business Journal	
	Hrg		
~	Aff.Mail	Estimated value of estate:	
>	Aff.Pub.	Real property: \$250,000.00	
	Sp.Ntc.	Probate Referee: Steven Diebert	
	Pers.Serv.	Trobate Referee. Steven Dieben	
	Conf.		
	Screen		
~	Letters		
~	Duties/Supp		
	Objections		
	Video		
	Receipt		
	CI Report		
	9202		
~	Order		
	Aff. Posting		Reviewed by: skc
	Status Rpt		Reviewed on: 4/25/16
	UCCJEA		Updates:
	Citation		Recommendation: SUBMITTED
	FTB Notice		File 23- Gibson

Petition To Claim Money On Deposit With The County Of Fresno (Prob. Code §11850)

	Petition To Claim Money On Deposit With The County Of Fresno (Prob. Code §11850)						
Charles R. Tidd			OLGA TIDD is Petitioner.	NE	EEDS/PROBLEMS/COMMENTS:		
DOD: 12/12/12							
			Petitioner states she was married to	C	ONTINUED TO 6/14/16		
			CHARLES R. TIDD at the time of his	Pe	er attorney request		
			death on 12/12/12.		•		
			On 7/29/15, an Order for Final	1.	Need clarification: Has the		
	Aff.Sub.Wit.	I	Distribution in 10CEPR00242 Estate of		decedent's original will been		
~			Linda J. Geist naming Charles R. Tidd		deposited with the proper Court		
Ě	Verified		as a beneficiary of \$2,394.03.		pursuant to Probate Code §8200? (Petitioner does not provide the		
	Inventory				address of Charles R. Tidd prior to his		
	PTC		Petitioner was unable to claim the		death, so it is unclear which court		
	Not.Cred.		funds as the surviving spouse and named executor of Charles R. Tidd's		would be proper.)		
	Notice of	Х	estate prior to this money being	_			
	Hrg		deposited with the Fresno County	2.			
	Aff.Mail	Х	Treasurer under Probate Code		distribution of the share distributed		
	Aff.Pub.		§11850.		to the Fresno County Treasurer for "Estate of Charles R. Tidd" to her, the		
	Sp.Ntc.				surviving spouse, as an individual;		
	Pers.Serv.		Probate Code §11850 states a		however, pursuant to the will, the		
	Conf.		person may claim money on deposit		successor would be the trustee of		
	Screen		in the county treasury by filing a petition with the court that made the		the 1995 Tidd Family Trust.		
	Letters		order for distribution showing the				
	Duties/Supp		person's claim or right to the		Therefore, need amended petition		
	Objections		property.		by Petitioner in that capacity, or if Olga Todd is not the current trustee,		
-	Video		,		then by the current trustee, which		
	Receipt		The decedent's will attached hereto		amended petition should		
	CI Report		appoints Petitioner as executor. The		necessarily include all information		
	9202		gross fair market value of the		required by Probate Code §13100 in		
	Order		decedent's real and personal property in California excluding		and Local Rule 7.12.5.		
	Oldei		property described in §10350 did not				
			exceed \$150,000 so no proceeding is	3.			
			now being or has been conducted		be filed in 10CEPR00242 Estate of		
			in California for administration of		Linda J. Geist, the estate from which		
			Charles R. Tidd's estate. Petitioner is		the distribution was made. At this time, the Court will consolidate this		
			the successor as defined in § 13006 to		case with 10CEPR00242, and the		
			his interest in the funds being held by the county treasurer. No other		amended petition should be filed in		
			person has a superior right to the		10CEPR00242.		
			interest of the decedent in the funds.				
			Petitioner is therefore the legal	4.	The Court may require Notice of		
			representative of the decedent's		Hearing under §1200 et seq., to		
			estate, entitled to bring this action to		interested persons, which may		
			claim the funds.		include the trustees/beneficiaries of the 1995 Tidd Family Trust.		
	Aff. Posting		Petitioner prays for an order:	Re	eviewed by: skc		
	Status Rpt		Establishing Petitioner's right to		eviewed on: 4/25/16		
	UCCJEA		the \$2,394.03 on deposit with the		odates: 4/26/16		
	Citation		Fresno County Treasurer; and		ecommendation:		
	FTB Notice		2. Such other further orders that the		e 24- Tidd		
	1 ID MOIICE	<u> </u>	Court may deem just and proper.	<u> </u>	- 47- IIUU		
					24		

Petitioner Gerilyn Stone (Pro Per, maternal grandmother)

Petition for Appointment of Probate Conservator of the Person

			NO TEMPORARY REQUESTED	NEEDS/PROBLEMS/COMMENTS:
				,
			GERILYN STONE , maternal grandmother, is Petitioner.	Court Investigator Advised Rights on 4/7/2016.
Cont from			~Please see Petition for details~	
Cont. from Aff.Sub.Wit.				
H	Verified			
✓			Court Investigator's Report was filed on 4/20/2016.	
	Inventory		4/20/2016.	
✓	Cap. Dec			
	Not.Cred.			
1	Notice of			
	Hrg			
✓	Aff.Mail	W/		
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			
1	Conf.			
	Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
1	Video			
	Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			Reviewed by: LEG
	Status Rpt			Reviewed on: 4/25/16
	UCCJEA			Updates:
✓	Citation			Recommendation:
	FTB Notice			File 25- Guizar

26 Patrick R. Kanaley (GUARD/P)

Case No. 13CEPR00537

Attorney: Julie C. Jones (for Petitioner Kathleen V. Kanaley)

Objector: Katie Marie Bacud (Pro per – Mother)

Probate Status Hearing RE: Proof of Appointments with Neurologist and Child Psychiatrist (PhD)

		GENERAL HEARING 5/2/2016	NEEDS/PROBLEMS/COMMENTS:
		Temporary petition denied/dismissed 3/15/16	
		KATHLEEN V. KANALEY , paternal grandmother, petitioned for temporary guardianship.	Minute order dated 4/19/16 orders the parties to meet daily at Attorney Jones' office
Cont. from 032916,		ge an analysis in the state of	at an agreed upon time to
041916		KATIE MARIE BACUD, mother, filed an objection	make calls together to find an
	Aff.Sub.Wit.	to guardianship on 3/15/16.	agreed-upon provider. Parties
	Verified	0.0/15/001/ 11.00	are also ordered to go
	Inventory	On 3/15/2016, the Court denied the temporary petition, but set this status hearing for mother	forthwith to the clerk's office
	PTC	to bring proof of appointments (for minor) with	and set up an appointment the Court Investigator. The
	Not.Cred.	a neurologist and child psychiatrist (PhD).	status hearing was continued
	Notice of		to 4/27/16. The general
	Hrg		hearing remains set for 5/2/16.
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf.]	
	Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video]	
	Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		Reviewed by: SEF
	Status Rpt		Reviewed on: 4/22/2016
	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 26- Kanaley

26 Patrick R. Kanaley (GUARD/P)

Case No. 13CEPR00537

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Supplemental declaration filed 3/28/2016 by Petitioner Kathleen Kanaley states Mother Katie Marie Bacud is not administering minor his necessary medications (i.e., iron and multivitamins with fluoride). She states she raised this same concern back in 2013. She states it is extremely important that mom administer these medications to minor on a daily basis to protect him from serious health complications.

1 Diana Chooljian Wolfe (CONS/E) Case No. 15CEPR00381

Conservator: Patrick Kelly Wolfe (pro per)

Probate Status Hearing Re: Filing of the Inventory and Appraisal

	PATRICK KELLY WOLFE, son, was appointed conservator of the estate	NEEDS/PROBLEMS/COMMENTS:
	without bond on 6/15/15.	
	Letters issued on 8/5/15.	This matter is scheduled to
Cont. from	Inventory and appraisal was due on	be heard in Department 54 at
Aff.Sub.Wit.	11/5/15.	8:30 a.m.
Verified	Notice of Status Hearing was mailed to	
Inventory	Patrick Kelly Wolfe on 2/29/16.	Need Inventory and Appraisal or
PTC		current written status report
Not.Cred.		pursuant to Local Rule 7.5 which
Notice of		states in all matters set for status
Hrg		hearing verified status reports must be filed no later than 10
Aff.Mail		days before the hearing. Status
Aff.Pub.		Reports must comply with the applicable code requirements.
Sp.Ntc.		
Pers.Serv.		Notice of the status hearing,
Conf.		together with a copy of the Status Report shall be served on all necessary parties.
Screen Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report	1	
9202	1	
Order	1	
Aff. Posting	1	Reviewed by: KT
Status Rpt]	Reviewed on: 4/25/16
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 1- Wolfe